

INFORMATION for *Erskine Catto*, Daughter to *James Catto* Servant to the Earl of *Kintore*, and the said *James Catto* as Administrator-in-law to her, for his Interest, and also as Assigny to *John Catto*, Son to *William Catto* in *Green of Udney*, PURSUERS;

Against *Alexander Gordon of Auchleuchries*, and *Charles Gordon*, Son to the deceas'd *James Gordon* at *Meikle-mill of Ellemont*, DEFENDERS.

IN May 1742, *James Catto* Merchant in *Ellon*, now deceas'd, executed a Testament, whereby he named the said *Alexander* and *James Gordons*, his Mother's Brothers, his Executors, and burdened them with Payment of his Debts and Funeral-charges; and three small Legacies to his Relations upon the Father's Side, in these Words.

"And further, that my Legatars pay, within Year and Day, *L. 100 Scots* to *John Catto*, Son to *James Catto* sometime in *Ellon*, out of the Rents of my House in *Ellon*; and I leave and bequeath to *William Catto* in *Green of Udney* his Son *John*, 400 Merks out of the first and readiest Money that shall accrefce on the Sale of my Houses and Feu in *Ellon*; and the like Sum to *Catto*, Daughter to *James Catto* Son to the above designed *James Catto*, Servant to the Earl of *Kintore*."

After the Testator's Death, the Executors took Possession of his whole moveable Effects, and uplifted the Debts due to him, which were pretty considerable, it is believed not under the Value of 4 or 5000 Merks, after Payment of Debts; though the Inventory given up in the confirmed Testament does not amount to near so much: Yet they scruple to pay the two last of the three Legacies above mentioned, though these were all the Tokens the Testator had left to his Father's Relations, who, but for this Testament, must have succeeded to him in the whole; and that upon this Pretence, That the 400 Merks to *John Catto* is to be paid out of the first and readiest Money that shall accrefce on the Sale of the Testator's Houses and Feu in *Ellon*, which did not fall to the Executors; but to *James Catto* the Heir. And the like Objection was made to the last Legacy of 400 Merks left to *Erskine Catto*; because it is immediately subjoined to the other; although the Testament does not say that it was to be paid out of the said Price, but simply bequeaths the Sum to be paid to her, as your Lordships have observed from the Clause.

The Legatars not being able otherwise to recover Payment of these small Sums, which was all the Testator thought fit to leave them out of his Executry, which he gave away from them to Relations who by Law would never have succeeded, were obliged to insist in a Process before the Commissary of *Aberdeen*; who, after a very full Debate, found the Legacies due. And the Defenders having brought the Process to this Court by Advocation, the Lord *Tinwald* Ordinary has thought fit to take the Debate to Report.

And, in the first place; The Lords will remember, that the Authors of the *Roman Law*, who have been so careful to lay down the most rational Rules for the Construction of Last-wills, and whose Judgment in these Matters is generally followed by this as well as by most other Nations, have, amongst many other Rules, uniformly agreed in this, That a Legacy bequeathed by the Testator is not rendered ineffectual because of an Error in the Description of the Thing bequeathed; and still less, if the Error occurs only in the Description of the Fund out of which the Legacy is to be paid. And the Reason is evident: The Bequeathment of the Legacy proves the Testator's Intention to honour the Legatar: And though he has erred in the Description; yet, as it is not certain that the Error was the sole inductive Cause of the Legacy, such Error is not sufficient to disappoint the Claim of the Legatar who is in Possession of the Testator's Will. No Irritancy is to be implied in such Bequeathments, unless it is particularly expressed: For, as the beneficial Construction and fair Execution of Last-wills is in effect a Trust reposed by Defuncts in the Law, it would no ways answer this Trust; to allow them to be evacuated and defeated by any Conjecture or Construction which is not necessarily founded in the Will.

And therefore, though a Legacy may be affected by an Error in the Description, where the Description is absolutely necessary for discovering the Testator's Will; as if he legates to *Sempronius* a Debt due to him by *Mævius*, or the Liberation of a Debt which *Sempronius* the Legatar owes the Testator: In such Cases, if there is no Debt due by the Legatar, or by *Mævius*, the Legacy can have no Effect; because the Liberation or Action legated does not exist. But, in all Cases where it can possibly have Effect, it is found effectual, the Error

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in the Description notwithstanding. For instance: A Testator believes, that he got an Estate, or a Sum of Money in Tocher with his Wife, when he got none; and he bequeaths to her such Estate or Sum, *jundum Cornelianum quem illa mihi doti dedit, ei heres dato*; or he believes he was Debitor to Sempronius, when he owed him nothing, and leaves him the Sum in Legacy, *centum quæ Sempronio debeo, ei do, lego*. In all such Cases where a special Sum or Subject is mentioned in the Will, so that *constat quid legare voluit*, though the Description is laid aside as supervacaneous, the Error in the Description is never allowed to frustrate or avoid the Testator's Will, but the Rule takes place, *Falsa demonstratio non vitiat legatum*; as appears from numberless Instances set forth in the Roman Law, l. 75. § 1. ff. *De legat. 1. l. 88. § 10. ff. De legat. 2. l. 40. § 4. De cond. & demonstrat. l. 2. § 8. De dot. prælegat.* In which last Law, it is laid down as a general Rule, That *quicquid demonstrandæ rei additur satis demonstratæ, frustra est*, and can have no Effect to annul the Legacy.

And this Rule obtains still more strongly in Cases where the erroneous Description is adjoined, not to the Legacy itself, but to another Subject or Fund out of which it is to be paid. Here there is no place for the above Distinction observed in the *demonstratio rei legatæ*, whether it is *necessaria rei designandæ* or not: But whether it is or not, the Legacy is effectual. And the Reason is, That though the Fund allotted by the Testator should be found not to exist, or not to belong to him, his Will can still have Effect by Payment of the Legacy out of other Funds; and, if it can, it ought to have it. This is distinctly laid down by Voet, from many Texts of the Civil Law, *tit. De cond. & demonstr. N°. 5. Quod si falsa demonstratio non ipsi rei legatæ adscripta sit, sed rei alteri, ex qua testator legatum præstari jubet, legatum non vitiat, sive demonstratio designandæ rei necessaria sit, sive res, unde legatum solvendum est, absque demonstratione illa nusquam apparitura esset.*

And so much is this true, that, should the Testator afterwards dispose of the Fund out of which he had appointed the Legacy to be paid, this will not import a Repeal of the Legacy, though such Repeal is inferred where a special Subject is bequeathed to a Legatar, and afterwards disposed of. And the Reason is, That, when a Fund is mentioned, it is always understood to be *demonstrative* only, and not to import a Restriction or Limitation of the Legacy. Thus Voet, in the Paragraph above quoted, *Idemque obtinet, si res demonstrata, ut inde legatum solvatur, ab initio quidem extiterit, sed vivo testatore esse deserit.* And he refers, amongst others, to an elegant Text from Julian's Digests, l. 96. pr. *De legat. 1.* where a Testator had bequeathed 400 aureos to Pamphila to be paid out of such and such Funds; and, before his Death, he converted all these Funds to other Uses: yet it is determined, that the Legacy subsists, and must be paid by the Heir.

And as these Rules of the Civil Law are founded in Equity, and in the rational Construction which Testators expect to be made of their Settlements; so they have been closely adhered to by this Court in deciding Questions of the like Nature. Spottiswoode and Durie do both take notice of a Case decided January 22. 1624, *Drummond contra Drummond*; where a Testator left L. 1000 in Legacy to be paid out of an heritable Debt due to him; and the Executor having objected, That the Fund out of which it was to be paid belonged to the Heir, the Lords found, "That albeit the Legacy could not receive Effect by Payment out of that Sum particularly; yet, nevertheless, that the Legacy remained good to affect the Defunct's other Moveables with the Payment thereof, if he had as many as might satisfy the same; and therefore admitted to the Pursuer, to prove, that there was more Moveables left by the Defunct, and intromitted with by the Executor, than might satisfy the foresaid Legacy." And Spottiswoode, *tit. Legacies*, observes the *ratio decidendi* thus: *The Lords found, that the wrong Destination of the Money should not frustrate the Legatar.* Your Petitioner can discover no Difference betwixt the Case of this Decision and the present Case. And it is equally plain, that the *ratio decidendi* assigned in it is precisely the same with the Rule laid down in the Civil Law for determining such Cases, *Falsa demonstratione non vitatur legatum*.

Another Case is observed by Lord Stair, decided 16th June 1664, *James Murray contra* the Executors of *Katharine Rutherford*; where *Katharine Rutherford* having left *James Murray* a Legacy of 600 Merks, whereof, says she, 200 Merks is in his Hand due to me by Bond; this Bond had been afterwards found to belong to *Katharine Rutherford's* Husband, and by him uplifted: yet the Lords found the Wife's Executors were liable to pay the whole Legacy of 600 Merks, and that no Abatement was to be given upon account of this Bond, which she had pointed out, as well as other Funds for Payment of this Legacy.

Sir John Nisbet observes two Cases to the same Purpose. The first indeed occurred in the Construction of a Deed *inter vivos*, July 17. 1667, *Harmiston contra Lord Sinclair*: "*Harmiston* being bound to pay to the Lord *Sinclair* his Brother, out of the first and readiest of the Rents of the Estate of *Sinclair*, a certain Annuity;" the Lords found,

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“ That he ought to pay the said Annuity entire, though he pretended he was not obliged simply, but out of the Rents; and that the said Rents, in respect of the real Burdens upon the Estate, and the low Rates of Victual, would not extend to satisfy the same, seeing he was obliged to pay out of the first and readiest.”

The other Decision is in the Case of a Legacy, July 11. 1676, *Finlay contra Little*. A Legacy being left in these Terms, viz. That it should be paid out of the Testatrix her Household-plenishing, and Debts due upon Compts; the Lords found, “ That albeit the said Plenishing and Debts should not extend to satisfy the said Legacy, that it was not a limited Legacy, but ought to be satisfied out of the other Executry; and that the said Words were only *executiva* as to the Order and Way of Payment in the first place, and *interpretatio* should be *ut actus valeat*; especially seeing the Legatar was the Defunct’s Relation; and it is to be presumed, that the foresaid Qualification was only as to the Way of Payment.”

Thus the Decisions of the Court appear closely to have followed the Principles of the Common Law. And hardly can a Case occur, where there is better Reason to adhere to them, than in the present. The Defunct, by this Testament, gives away his whole Executry, which was very considerable, to two Relations on the Mother’s Side, who could never have succeeded to him; and leaves nothing to *William Catto*, his nearest Relation on the Father’s Side, who by Law would have succeeded to the whole Executry, but this small Legacy of 400 Merks to his Son *John*, not a tenth part of his Executry. And although he points out the Price of his Houses in *Ellon*, as a Fund out of which the Legacy might be paid, (and this Fund fails, by reason the Houses were never sold by the Testator, and therefore must descend to *James Catto*, his Heir); yet there is no Ground to imagine, that he intended the Legacy should be void, in the Event of the Failure of that Fund. The *præsumptio voluntatis* lies strongly otherwise, not only from the Circumstances of the Relation to whom this Legacy is left, whose Father, but for this Testament, would have taken the whole moveable Succession, but also from the Anxiety he expresses in his Will, that these Legacies should be made effectual. A full Copy of the Will is hereto annexed: And though it is short; yet this Anxiety is expressed by two repeated Clauses. 1st, He makes over “ his hail Goods, Gear, outfight and insight, Corns, Crop, Cattle, Horse, and all Bestial, with Bonds, Bills, and Sums of Money, and generally all that to him any other way appertains, to and in favours of *James and Alexander Gordons*, his Uncles, under the Limitations and Restrictions after following:” And these are the Payment of his Funeral-charges and Debts, and the Payment of these three small Legacies.

And, after specifying the Legacies, he again adds, “ And, on the above Conditions and Restrictions, I appoint my above Uncles my Executors and universal Legatars, &c.”

By both these Clauses, it is manifest, that the Defunct named the said *James and Alexander Gordons* his Executors, and gave them Right to his Moveables, expressly under Condition of their paying these small Legacies to his other Relations: And therefore it is, with Submission, absurd to plead, that his pointing out a Fund for their more ready Payment, which afterwards failed, by his not selling the Houses, should evacuate a Legacy with which he burdens the Grant of his Moveables to these Executors, when the Moveables they have taken by it are not denied to be sufficient to clear all his Debts and Legacies; and also to leave a very considerable Residue, which is to go to their own Profit, in virtue of this Will; the Implement whereof they now dispute.

In behalf of the Executors, it was pled, “ That the Rules of the Civil Law cannot apply to the Law of Scotland, because the Civil Law made no Distinction betwixt the Succession of Heritage, and Moveables; whereas our Law forbids Heritage to be burdened, or conveyed by Testament: And therefore, if a Testator attempts so to convey or burden it, his Deed is ineffectual, for want of Power, and can infer no Warrantice against his Executors. And, for this, Reference was made to Lord *Stair’s Instit. tit. Executry, par. 41*; and the Decision there quoted, February 21. 1663, *Wardlaw contra Fraser of Kimmundy*; and also to the following Decisions, 7th February 1566, observed by *Maitland*, November 26. 1674, *Paton contra Stirling*, observed by Lord *Stair*, and November 22. 1698, *Cumming contra Cumming*, observed by Lord *Fountainhall*; all referred to in the Dictionary, under the Title, *Quod potuit non fecit, vol. 2. p. 308*; and whereby it was found, That a Conveyance of heritable Subjects in a testamentary or Deathbed-deed, did not infer Warrantice against the Executor.”

And there was also some Strefs laid upon this, “ That the Testament does not injoin the Executors to pay the Legacies in question; but leaves and bequeaths these Sums to them out of the first and readiest of the Money that should accresce on the Sale of the Houses; which is plainly a *legatum speciei* bequeathed *finendi modo*, and imports no more, but that

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“ the Executors should not traverse the Defunct's Will, but allow the Legatars to draw these Sums out of the Price of the Houses when they should come to be sold ; but by no means that they should pay these Sums out of the other Executry, if the Houses should belong to the Heir, and the Price thereof never accrue to the Executors.”

But the Defenders would need to adduce some very strong Authority before they can satisfy your Lordships, that the Rules laid down in the Civil Law will not take place with us, when they appear to be so evidently founded in Equity and good Reason, and therefore adopted into the Practice of most modern Nations, and so literally followed and adhered to in the several Decisions already mentioned. Nor do the Decisions referred to by the Defenders at all interfere with this Doctrine. The Point established by the Decisions 1674 and 1698 is, That where a Deed *inter vivos* is reduced upon the Head of Deathbed, the Executor is not liable to warrant the same to the Grantee out of the Executry ; and that for this Reason, that the Deed is voided because of a Defect of Power in the Granter, which he did not know of at the Time of the Deed ; as he might then have lived as long as it was necessary to support it : And though he might have burdened his Executor with the Warranty of it ; yet he did it not. *Quod potuit non fecit.*

In the old Decision 1566, observed by Maitland, Heirship-moveables were left directly in Legacy by Testament, which could not be effectual : And the Executor was found not obliged for the Value, because it was understood, by the Conception of the Testament, that the Executor was bound only to a *Non repugnantia*, and to allow the Legatar to take the Heirship for any Right he had ; but not to warrant or make good the Legacy. And the Case betwixt *Wardlaw* and *Frazer*, in 1663, seems to be to the same Purpose, as Lord *Stair* observes it in his *Institutions*, viz. That a Wadset of Lands being left in Legacy by Testament, the Executor was not bound to make it good ; though, in his Collection of *Decisions*, he observes no other Point decided, but that the Legacy was found not effectual against the Heir, further than to the Extent of her Husband's Interest, who had homologated the same.

But this Exemption of the Executor from being liable to make good the Value of an heritable Subject left in Testament, though favoured by these two Decisions, cannot be considered as a settled Point. For your Lordships will observe the contrary decided, in a Case observed, and very fully reasoned upon, both by Lord *Stair* and *Dirleton*, December 2. 1674, *Cranston contra Brown* ; where the Lords found an Executor liable to make good the Legacy of an heritable Sum left in Testament, as being in Effect *legatum rei alienæ scienter legatæ*. And, in another Case, June 24. 1664, *Falconar contra Dougal*, they found, That a Legacy of a Bond, which a Testator had assigned away to the Executor before his Testament, behoved to be made good by the Executor, upon the same Principle ; That it was a *legatum rei alienæ*. And both these Decisions are referred to by Lord *Stair*, in his *Institutions*, tit. *Executry*, § 41.

And therefore, did the present Case depend upon that Question, it would fall to be considered, which of these Decisions are best founded. Nor can the Pursuer see a good Reason, why an Executor ought not to make good the Legacy of an heritable Subject, when the Moveables are sufficient to answer it, as well as the Value of any other Subject that is truly *res aliena* : For, whether it does not at all belong to the Testator, or belongs to him but so as he cannot dispose of it in that Manner, seems to be the same, as to the Principles upon which Legacies *rei alienæ* are sustained ; as is very well reasoned by Lord *Stair* and *Dirleton* in the above Decision.

But then, we apprehend, that, whichever of those Decisions are followed, the Legacy now in question ought to be sustained : For the very Ground of the Decisions, excoiming Executors from making good the Legacy of an heritable Subject, is, That the Subject left was without the Power of the Testator, and of itself could not be effectual ; and though he might have burdened the Executor to pay the Value, yet he did it not. *Quod potuit non fecit.*

Here the Reverse is the Case. The Subject he leaves is a Sum of Money ; the Executors are bound to pay it ; and they have sufficient Effects to pay it : *Ergo*, He did nothing without his Powers. *Fecit quod potuit.* And his express Will is not to be defeated, because he points out *demonstrativè* a Fund for the more ready Payment, which happened not to be made effectual, as he died without selling it himself, and the Subject thereby descended to his Heir.

The Defenders mentioned a Decision, “ January 21. 1673, *Forbes contra Forbes*, where a Legacy having been bequeathed out of the Rests due by the Testator's Tenants, was found not prestable, further than to the Extent of these Rests.” But, as the Clause in this Testament is not transcribed in the Decision, it is probable some Indication may have thence

thence appeared of the Testator's Will, that the Legacy was to be confined to those Arrears : And the Legatars seem the less to have struggled this Point, that they got the Executor found liable to accompt for exact Diligence against the Tenants, for Recovery of the Arrears whereby the Legacies might be cleared.

And as to the Criticism suggested by the Defenders, " as if there was a Difference in the " Style of the Testament, betwixt the first Legacy, which is made obligatory upon the Executors, and the other two, which are left only *finendi modo*, and in so far as the Legatars can, in virtue of the Testament, affect the House out of which they are appointed to " be paid ; " When your Lordships peruse the Copy of the Testament, it is believed you will be satisfied there is nothing in the Observation. The Defunct expresses as great an Anxiety, as he could well do in so short a Paper, to have the whole Legacies duly paid. He leaves his whole Goods and Gear, and Sums of Money, to the Executors, expressly under that *Condition*. And it is his Anxiety for the Payment of this small Legacy to *John Catto* in particular, that makes him point out this as a Fund, *out of the first and readiest* of which it should be paid : The plain Import of which is, That, if this Fund should answer more readily than any other belonging to the Executors, it should be applied for that Purpose : But there is not a Word in the Testament that insinuates, that the Legacy should be void in case these Houses should not be sold, but descend to his Heir. And indeed it is inconsistent to suppose, that a Man would express so strong an Anxiety to have a Legacy made effectual to a Relation, to whom he was under so great Obligation to leave it, as being by Law his nearest Successor in the whole Executry ; and yet, with the same Breath, should mean to defeat it by an impossible Condition. Such Construction would be extremely contrary to the Genius of the Law, which always favours the benign Interpretation of last Wills, and will not allow them to be frustrated upon a Clench, which appears to have no Foundation in the Intention of the Testator.

The Pursuer has argued the Case with respect to the Legacy left to *John Catto*. As to the other Legacy left to his own Daughter, *Erskine Catto*, he apprehends it is simple, and has no Concern with the Adjection annexed to the former Legacy ; and therefore the Defenders Objection does no ways apply to it ; and for that he appeals to your Lordships for Perusal of the Testament, which is hereto annexed. Nor had the Lord Ordinary any Difficulty as to this Legacy : But, as the Defenders made a Question of it, his Lordship allowed both to go together in the Report, that the Cause might not be divided.

In respect whereof, &c.

JAMES FERGUSON.

JAMES CATTO's TESTAMENT.

KNow all Men, by these Presents, me *John Catto* Merchant in *Ellon* : Forasmuch as I am at present diseased in Body, though sound in my Memory and Judgment, to have made my Latter-will and Legacy, in manner after following : That is to say, I commit my Soul to the Mercy of God, my great Creator, through the Merits of Jesus Christ, for Salvation, and my Body to be decently interred in the Church-yard of *Ellon*, and my haill Goods, Gear, outfight and insight, Corns, Crop, Cattle, Horse, and all Bestial, with Bonds, Bills, and Sums of Money, and generally all that to me any other ways appertains, to and in favours of *James Gordon* in *Meikle Mill of Esflement*, and *Alexander Gordon* of *Auchleuchbries*, my Uncles, under the Limitations and Reservations after following : That is to say, my foresaid Executors are hereby bound to bear the Charges of my Interment and Funerals ; *item*, That they pay all my lawful Debts ; and further, That my Legatars pay, within Year and Day, *L. 100 Scots* to *John Catto*, Son to *James Catto* some time in *Ellon*, out of the Rents of my House in *Ellon*. And I leave and bequeath, to *William Catto* in *Green of Udry* his Son *John*, 400 Merks, out of the first and readiest Money that shall accresce on the Sale of my Houses and Feu in *Ellon* ; and the like Sum to *Catto*, Daughter to *James Catto*, Son to the above designed *James Catto*, and Servant to the Earl of *Kintore*. And, on the above Conditions and Restrictions, I appoint and constitute my above Uncles my Executors and universal Legatars in all and haill my Stock and Fortune, and to dispose of the same ; and to call for and uplift all Sums of Money due me, and grant Discharges therefor ; which shall be as valid as if I had granted the same in my Lifetime. And I finally consent to Registration. Signed, at *Ellon*, 4th May 1742, before these Witnesses, &c.

